

STATE OF CALIFORNIA  
CALIFORNIA DEPARTMENT OF AGING  
**DUTY STATEMENT**  
CDA 9003 (REV 04/2021)



See CDA 9003-I for Instructions	
<b>1. INCUMBENT</b> <<Insert Incumbent Name or Delete for Blank>>	<b>2. EFFECTIVE DATE (MM/DD/YYYY)</b> <<Insert Effective Date (MM/DD/YYYY)>>
<b>3. DIVISION</b> Division of Administrative Services	<b>4. UNIT NAME</b> Financial Management Branch - Local Finance Bureau
<b>5. CLASSIFICATION</b> Staff Services Manager II	<b>6. POSITION NUMBER</b> 797-643-4801-960

**7. SUPERVISOR'S STATEMENT:** *I CERTIFY THAT THIS DUTY STATEMENT REPRESENTS AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION.*

<b>SUPERVISOR'S NAME (Print)</b> Nicole Dopp	<b>SUPERVISOR'S SIGNATURE</b>	<b>DATE</b>
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**8. EMPLOYEE'S STATEMENT:** *I HAVE READ THIS DUTY STATEMENT AND AGREE THAT IT ACCURATELY REPRESENTS THE DUTIES I AM ASSIGNED.*

<b>EMPLOYEE'S NAME (Print)</b>	<b>EMPLOYEE'S SIGNATURE</b>	<b>DATE</b>
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**You are a valued member of the department's team. You are expected to work cooperatively with internal and external stakeholders to enable the department to provide the highest level of service possible. Your efforts to treat others fairly, honestly, and with respect are important to everyone who works with you.**

<b>9. DESCRIPTION</b> <p>Under the general supervision of the Chief Financial Officer (CFO), a Staff Services Manager III, and in collaboration with the Chief Accounting Officer, an Accounting Administrator II, and the Chief Budget Officer, a Staff Services Manager II (Supervisor), the Chief Local Finance Officer oversees the Local Finance Bureau (LFB) which consists of two Staff Services Manager I (Supervisors) and six Analysts in carrying out all financial functions for the Area Agencies on Aging (AAAs) and the Aging and Disability Resource Connections (ADRCs). The tasks require a high level of interpersonal, leadership and communication skills and independence of action in carrying out the responsibilities. The incumbent must also be able to prioritize, meet strict deadlines, and remain professional during stressful situations. These duties are broadly defined as follows:</p> <p><u>35% Local Finance Prioritizing, Planning, and Communications</u></p> <ul style="list-style-type: none"><li>• Implements and maintains departmental policies and procedures regarding AAA's and ADRC's State and federal local assistance budgets.</li><li>• Provides direction, guidance, and leadership to staff on local finance issues. Recommends and implements policy, plans, and procedures to effectively direct LFB staff toward the goals and objectives of the Department while ensuring the integrity of financial practices and principles.</li><li>• Monitors, evaluates, and makes recommendations, to the CFO and Executive Management, on the potential impact of proposed and/or chaptered legislation on AAA and ADRC's State and federal Local Assistance budgets.</li></ul>
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- Advises and provides consultation to executive and senior management on a range of highly sensitive and complex fiscal issues, including policies and procedures introduced by the California Health and Human Services Agency (CHHSA), Department of Finance (DOF), State Controller's Office (SCO), and Financial Information System for California (FI\$Cal) that would impact the Department's statewide grantees.
- Provides consultation to the CFO on inquiries from control agencies such as the DOF, the Legislative Analyst's Office, and the SCO on complex local finance matters, including budget updates, revisions, policy, and procedural issues. Coordinates the preparation of local finance information in response to requests from control agencies.

#### 30% Local Finance Reporting and Analysis Oversight

- Provides consultation and decision making to the Chief Budget Officer on the preparation of the AAA and ADRC local assistance allocations, Interstate Funding Formula (IFF), legislative analyses, Spring Finance Letters, and Budget Change Proposals.
- Collaborates with the CFO, the Business Management Bureau, and stakeholders to update and implement an improved Local Assistance contract process. Practices continual process improvements to the contract process based on stakeholder feedback and funding guidelines.
- Reviews local finance operations for ways to increase efficiency, including developing and implementing financial management tools and reports to increase the accuracy, usefulness, and availability of financial information to Executive management.
- Oversees the preparation of timely and accurate AAA and ADRC expenditure and budget reports, expenditure projections, and ad-hoc fiscal analyses. Utilizes the reports and projections to assist in the decision making of departmental priorities.
- Provides financial training and consultation to all levels of departmental staff and leadership.
- Organizes, coordinates, and reviews special assignments from Executive management and control agencies.

#### 15% State and Federal Local Assistance Contract Maintenance

- Provides consultation, guidance, and direction to the CFO, Chief Budget Officer, and Chief Accounting Officer on all Local Assistance AAA and ADRC contracts, amendments, budgets, closeouts, and allocations of funding to ensure compliance with State and federal terms, conditions, and audit requirements.
- Collaborates with the Chief Accounting Officer and Chief Budget Officer to monitor appropriations, expenditures, and outstanding audit findings regarding State and federal Local Assistance funding. Addresses any issues in appropriations, expenditures, or audit findings that will impact Local Assistance funding levels, including local payments, and actively works to find solutions.
- Identifies, addresses, and informs CFO and Executive Management of significant contractual issues, such as delayed closeouts, significant surpluses, and non-compliance of funding terms with AAA and ADRC partners. Proactively seeks out ways to ensure that these issues are avoided and/or remedied to avoid a disruption in services to older adults.
- Drafts correspondence and communication to the Area Agencies on Aging (AAAs) to inform the locals of any prospective funding level changes or requirements for State and federal funding.

#### 15% Staff Development and Administrative Duties

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- Responsible for managing the performance of LFB management staff including performance appraisals, probationary reports, documentation of performance problems, and disciplinary actions.
- Oversees the recruitment, hiring, selection, training and development of LFB staff.
- Designs and implements a program of training and professional development for staff in the Local Finance Bureau and promotes upward mobility.
- Reviews organizational internal control procedures and makes recommendations, in collaboration with SSM I Supervisors, to realign staff duties as required.
- Disseminates strategic directives and allocates resources to meet the outlined goals and priorities.

5% Marginal Duties

- Represents the CFO and the FMB at various meetings, as needed.
- Act as/on behalf of the CFO, to ensure appropriate leadership and guidance to the FMB, as needed.
- Performs other related duties, as required.

Working Conditions:

- Due to the COVID-19 pandemic, CDA staff are working remotely per the state's emergency telework policy at least through December 31, 2020. The physical work location of the position is designated at the department's headquarters location, a two-story building and standard office modular workspace located in Natomas. The duties of the position require sitting for long periods of time while using a personal computer, reviewing documents, and attending meetings whether they are digital (i.e. Zoom, WebEx, MS Teams, etc.) or in person.